

**2009 DRAFTING REQUEST**

**Senate Amendment (SA-SB390)**

Received: **02/19/2010**

Received By: **rchampag**

Wanted: **Soon**

Identical to LRB:

For: **David Hansen (608) 266-5670**

By/Representing: **John**

This file may be shown to any legislator: **NO**

Drafter: **rchampag**

May Contact:

Addl. Drafters:

Subject: **Employ Pub - retirement**

Extra Copies:

Submit via email: **YES**

Requester's email: **Sen.Hansen@legis.wisconsin.gov**

Carbon copy (CC:) to:

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**Pre Topic:**

No specific pre topic given

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**Topic:**

WRS annuity deductions for retiree organizations

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**Instructions:**

See attached.

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**Drafting History:**

<u>Vers.</u>	<u>Drafted</u>	<u>Reviewed</u>	<u>Typed</u>	<u>Proofed</u>	<u>Submitted</u>	<u>Jacketed</u>	<u>Required</u>
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FE Sent For:

**<END>**

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/1	rchampag	1 2/19 JLD		==			
FE Sent For:							

<END>

## Champagne, Rick

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**From:** Wagnitz, John  
**Sent:** Thursday, February 18, 2010 4:40 PM  
**To:** Champagne, Rick  
**Subject:** FW: SB 390--amendment to include WREA  
**Importance:** High  
**Attachments:** SB 390 WREA Proposed Amendment.pdf; 20100126sb390hansen.doc

Rick,

could you please draft an amendment to SB 390 to address the concerns of WREA?

Thank you,

John Wagnitz  
Office of State Senator Dave Hansen  
18 South, State Capitol  
phone: (608) 266-5670

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**From:** Jane Elmer [mailto:[jelmer@wrea.net](mailto:jelmer@wrea.net)]  
**Sent:** Friday, February 12, 2010 12:00 PM  
**To:** Wagnitz, John  
**Subject:** Fw: SB 390--amendment to include WREA  
**Importance:** High

----- Original Message -----

**From:** Jane Elmer  
**To:** John Wagnitz  
**Sent:** Friday, February 12, 2010 11:53 AM  
**Subject:** SB 390--amendment to include WREA

Dear John:

Thank you for visiting with me this morning. I am attaching the letter WREA delivered to and discussed with Senator Hansen in late January. As indicated in the letter, it is not clear that WREA would be among the groups eligible for WRS dues deduction if this legislation were enacted. Current SB 390 limits the eligible organizations to retiree groups affiliated with employee groups. WREA is an independent organization and does not have any ties to an employee group. Past versions of this legislation have included WREA.

WREA has played a major role in protecting and promoting the WRS for almost 60 years. We currently represent over 13,600 members in the Wisconsin Retirement System (WRS), making WREA the largest annuitant organization. Our signature goal states: *WREA will continue to protect and improve the Wisconsin Retirement System (WRS) and to oppose any proposals that threaten the long-term integrity of the fund.* Among our accomplishments: WREA (then WRTA) was the major plaintiff in the Special Investment Performance Dividend (SIPD) litigation (1987-1997) to restore the pension fund raid. Ultimately this litigation was successful.

02/19/2010

I am also attaching SB 390 with a suggestion for wording. Thank you for understanding WREA's concern and sharing this message with the bill drafters.

I will look forward to hearing from you. The week of February 15, I will be on vacation. However, I can be reached by cell phone: 608-279-5363. Or you can contact my assistant Annaliece Rynes at 608-824-1728.

Sincerely,

Jane Elmer, WREA Executive Director and Lobbyist

Jane Elmer  
WREA Executive Director  
2564 Branch Street  
Middleton, WI 53562  
608-831-5115 (main line); 608-824-1721 (direct line)  
[jelmer@wrea.net](mailto:jelmer@wrea.net)

Check out our website at [www.wrea.net](http://www.wrea.net)



State of Wisconsin  
2009 - 2010 LEGISLATURE

LRB-3577/1  
RAC:kjfrs

## 2009 SENATE BILL 390

November 9, 2009 - Introduced by Senators HANSEN, COGGS, WIRCH, KREITLOW, TAYLOR, LEHMAN, HOLPERIN, MILLER, ERPENBACH, CARPENTER and VINEHOUT, cosponsored by Representatives MASON, POCAN, BERCEAU, VAN AKKEREN, JORGENSEN, SHILLING, SINICKI, DANOU, BENEDICT, HIXSON, ROYS, A. WILLIAMS, KESSLER, COLON, HEBL, POPE-ROBERTS, ZIGMUNT, MOLEPSKE JR., TOLES, PARISI and SOLETSKI. Referred to Committee on Labor, Elections and Urban Affairs.

- 1 AN ACT *to amend* 40.07 (1); and *to create* 40.03 (2) (im) and 40.08 (1j) of the  
2 statutes; **relating to:** deduction of voluntary payments from retirement  
3 annuities under the Wisconsin Retirement System.

---

*represents annuitants  
of the Wisconsin Retirement System*  
**Analysis by the Legislative Reference Bureau**

This bill permits an annuitant under the Wisconsin Retirement System, who is a member of a retiree organization that ~~is affiliated with an employee organization~~, to have the Department of Employee Trust Funds (DETF) deduct from the annuitant's annuity monthly voluntary payments for either organization or an entity affiliated with either organization. Under the bill, the secretary of employee trust funds must establish a procedure for deducting monthly voluntary payments and for designating the organizations and affiliated entities eligible to receive the voluntary payments. The procedure must require that DETF, at the request of an organization or affiliated entity, mail to annuitants any printed information and membership materials for the organization or affiliated entity. The organization or affiliated entity must provide DETF the printed information and membership materials and DETF must identify to the organization or affiliated entity the total number of annuitants.

The bill also requires the secretary to charge organizations and affiliated entities that wish to receive monthly voluntary payments a fee to cover all costs for mailing the printed information and membership materials.

Finally, the bill provides that, when remitting deducted voluntary payments to an organization or affiliated entity, the secretary must, for each annuitant from

**SENATE BILL 390**

whose annuity voluntary payments are deducted, provide the organization or affiliated entity with the annuitant's name, amount of the deduction, and a unique identifier.

Because this bill relates to public employee retirement or pensions, it may be referred to the Joint Survey Committee on Retirement Systems for a report to be printed as an appendix to the bill.

For further information see the *state* fiscal estimate, which will be printed as an appendix to this bill.

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***The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:***

1       **SECTION 1.** 40.03 (2) (im) of the statutes is created to read:

2       40.03 (2) (im) Shall permit an annuitant who is a member of a retiree  
3       organization that is affiliated with an employee organization to have the department  
4       deduct from the annuitant's annuity monthly voluntary payments for the employee  
5       or retiree organization or any other entity affiliated with either organization. The  
6       secretary shall establish a procedure for deducting monthly voluntary payments and  
7       for designating the organizations and affiliated entities eligible to receive the  
8       voluntary payments. The procedure shall require that the department, at the  
9       request of an organization or affiliated entity, mail to annuitants any printed  
10      information and membership materials for the organization or affiliated entity. The  
11      organization or affiliated entity must provide the department the printed  
12      information and membership materials and the department must identify to the  
13      organization or affiliated entity the total number of annuitants. The secretary shall  
14      charge organizations and affiliated entities that wish to receive monthly voluntary  
15      payments a fee to cover all costs for mailing the printed information and membership  
16      materials. When remitting deducted voluntary payments to an employee or retiree  
17      organization or affiliated entity, the secretary shall, for each annuitant from whose  
18      annuity voluntary payments are deducted, provide the employee or retiree

**SENATE BILL 390**

1 organization or affiliated entity with the annuitant's name, amount of the deduction,  
2 and a unique identifier.

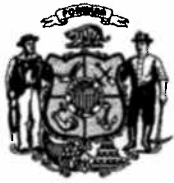
3 **SECTION 2.** 40.07 (1) of the statutes is amended to read:

4 40.07 (1) Notwithstanding any other statutory provision, individual personal  
5 information in the records of the department is not a public record and shall not be  
6 disclosed except as provided in this section and s. 40.03 (2) (im).

7 **SECTION 3.** 40.08 (1j) of the statutes is created to read:

8 40.08 (1j) VOLUNTARY PAYMENTS TO EMPLOYEE OR RETIREE ORGANIZATIONS AND  
9 AFFILIATED ENTITIES. Notwithstanding sub. (1), an annuitant may have the  
10 department deduct from his or her annuity monthly voluntary payments to an  
11 employee or retiree organization or affiliated entity under s. 40.03 (2) (im).

12 (END)



State of Wisconsin  
2009 - 2010 LEGISLATURE

LRBa1607/1

RAC: :....

jld

*Soon*

SENATE AMENDMENT ,  
TO 2009 SENATE BILL 390

- 1 At the locations indicated, amend the bill as follows:
- 2 1. Page 2, line 3: after "employee organization" insert "or who is a member of
- 3 a retiree organization that represents annuitants".
- 4 (END)